



Learning Partnerships

Planning Workbook
Arts Extension Service,
University of Massachusetts Amherst



Learning Partnerships Planning Workbook

By Craig Dreeszen, Ph.D. published by the Arts Extension Service, University of Massachusetts Amherst in collaboration with the Arts Education Partnership; Council of Chief State School Officers; and the National Assembly of State Arts Agencies. Funded in part by the National Endowment for the Arts.
Web design by Tom Greene.

The *Learning Partnerships Planning Workbook* provides a structure for planning arts and education collaborative initiatives. A companion *Learning Partnerships Evaluation Workbook* helps with collaborative project evaluations.

This planning workbook is one component of a partnership-helping program that includes the original Learning Partnership publication, an on-line Learning Partnership Workshop, and planning conferences offered by some leading state arts agencies and arts service organizations. The publication can be acquired on-line, or from the Arts Education Partnership as a printed pamphlet. The workshop can be taken as a free on-line course or through participating arts agencies.

Acknowledgements:

Richard Deasy and Arnold Aprill co-authored with Craig Dreeszen the Learning Partnerships publication that accompanies this Workbook. John Benjamin at the Kentucky Arts Council and Carol Guidice with the Massachusetts Cultural Council pioneered the Learning Partnership planning conferences. Doug Herbert of the National Endowment for the Arts inspired this work, which the Arts Endowment has helped fund. This workbook was developed with the help of consortium partners: The Arts Education Partnership, the National Assembly of State Arts Agencies; and the Council of Chief State School Officers.



**Arts
Education
Partnership**





Nine steps to build a successful partnership

1. Prepare for partnerships
2. Explore a shared need
3. Decide to act in collaboration
4. Set goals and objectives
5. Describe activities
6. Establish timeline
7. Budget
8. Plan fundraising
9. Anticipate evaluation

How to use this Workbook

You may use the Planning Workbook to design a new partnership or improve an existing one. It is intended to complement the on-line Learning Partnership Workshop but can stand alone as a planning aid.

The Workbook presents a series of planning questions within worksheets for each step. Individual representatives of potential partners should each answer the questions that complete the first step. The remainder of the Workbook is intended to guide collaborative planning meetings. The questions may serve as agenda items. Your answers culminate in a collaborative.



Generate a Report

You may type answers on-line directly into text boxes provided in the Workbook as specified in the instructions. Alternatively you may print this PDF version and write or type your partnership's planning decisions onto the paper worksheets. If you fill out the on-line version, at the end of the workbook you have the option to automatically generate a report based on the information you have entered. The report summarizes the goals and objectives of your partnership, and you can print the report or save it as an HTML file.

The best plans are developed through collaborative discussion. Alternatively a few key leaders can use these questions to develop a draft plan to present to the other partners. As you discuss your answers you will find out if assumptions are shared among the partners and test for consensus. You will be confronted with predictable collaborative problems.

Most people will find it useful to go through the Workbook questions as they are presented, but you may answer the questions in any sequence.

Get help and examples

You can get additional help and examples throughout the Workbook. Click the  icon to get additional advice or instructions or the  icon to see an example.


Name Your Partnership

Before you begin, enter the name of your partnership:
(You can change this name at any time.)



1. Preparing for Partnerships:
Know your own interests

You may be working in partnership because you saw an opportunity or problem with which you required help or because you were asked to participate in a joint venture. In either case, consider why you would collaborate, what you want out of the partnership, what you can contribute, and what limits your participation. The first step of a partnership is to know yourself.

1.1 Your motivations — Check all that apply and describe. Which of the following factors primarily motivate you (or your school or agency) to work with others on this collaborative venture? 

- To solve one or more problems. List the fundamental problems that prompt you to consider this partnership?

- To meet one or more needs or respond to an opportunity. Identify the needs or opportunities.

- To implement a plan, policy or mandate. Which?

- To better utilize a resource (programs, facilities, personnel, etc.) What are the most important resources you would tap?

Compare your answers with your partners by printing this page and bringing to a meeting of the proposed partnership. Attend to what each partner perceives as the need to which the partners should respond. If your sense of the problem is similar or complementary, you have an excellent basis on which to proceed. If not, you should attempt to develop a shared understanding of the problem/opportunity before you suggest solutions.



1. Prepare for Partnerships: Know your own interests

Note which of your answers are important to share with your partners. At your next partnership meeting compare notes.

1.2. Your role—What are the various hats you are wearing that are relevant to this partnership?



1.3 Your needs— What do you need and want in order to be a willing partner?



| | Fundamental needs – requirements | Wants – would be good to have |
|--|----------------------------------|-------------------------------|
| For yourself | | |
| For your organization (or boss or board) | | |
| For your constituents and community | | |

1.4 Your limits What limits or constrains your ability to participate in this partnership?. What personnel, facilities, financial, policy, or legal restrictions may limit your ability to fulfil this potential partnership? Note which of these you should acknowledge to your potential partners.

1.5 What you bring to partners What kinds of expertise, staff time, or contacts can you provide? What sort of facilities or equipment can you offer?



2. Explore a shared need:


Ask why and for whom you are collaborating


The remainder of this Workbook is intended to guide collaborative planning among the partners.

Here the potential partners explore whether they have shared interests.

Think of your answers to this section as first-draft plans that will evolve with more planning.

At this stage you may have not yet committed to the partnership.

2.1 Why is this partnership being planned? Shared problem statement **To what specific need, problem, or opportunity does this initiative respond?** 

2.2 Tentative project idea – what is it you would like to do together? **What might your collaborative project be?** 

2.3 Who is affected? **Who is most affected by the identified problem or opportunity?**

2.4 Beneficiaries **Who should benefit from your planned initiative?**
Direct beneficiaries.

Indirect beneficiaries

2.5 Place **What is the region, town or city, district, or school that would benefit?**



3. Decide to act in collaboration

Here the partners should decide whether or not to proceed. Some who started planning may decide to drop out. You may decide to recruit others.

Start to design the structure of the partnership. ?

3.1 Commitment— Having explored individual needs and constraints and shared needs, do the partners commit to proceed to plan the collaborative venture? Yes No

3.2 Partners— Who are the project partners?

3.2.1. Names of decision-making partners active in planning and evaluation, fund raising, and implementation.

Institution or constituency represented

3.2.2. Names of advisory partners who advise, provide funds, and implement specific programs, but who may not be involved in overall planning of the collaborative initiative





Institution or constituency represented

3.2.3 Who else should be involved?

Names

Institution or constituency represented



| | |
|---|---|
|  <p>4. Write goals What long-term results would you achieve?</p>  | <p>4.1 First-draft, shared goals— What are your shared, long-term goals for the collaborative project?  </p> <p>Goal 1 Goal 4</p> <p>Goal 2 Goal 5</p> <p>Goal 3 Goal 6</p> |
|---|---|



5.1 Goals and objectives— Establish long-term goals and for each goal, short-term objectives (or anticipated outcomes).

Goal #1

5. Set objectives

In this step project short-term results associated with each long-term goal.

Here you want to anticipate detailed outcomes linked with the more general goals each supports. ?



Each goal will have one or many objectives that, if achieved, would help realize the goal.

Objective 1 (short-term results or anticipated outcomes)

Notes: Who, when, where...?


Objective 2

Objective 3



Objective 4

Objective 5




| | | |
|---|--|---------------|
|  <p>5. Set objectives for additional goals</p> <p>Continue to establish additional long-term goals and short-term objectives</p> | 5.2 Goals and objectives, continued — Establish long-term goals and for each goal, short-term objectives (or anticipated outcomes). Goal#2 | |
| | Objective 1 | Notes: |
| | Objective 2 | |
| | Objective 3 | |
| | Objective 4 | |
| | Objective 5 | |




| | | |
|--|---|--------|
|  <p>5. Set more goals and objectives</p>  <p>If you have defined your project in general terms, now is the time to get specific.</p> | <p>5.3 Goals and objectives, continued— Establish long-term goals and for each goal, short-term objectives (or anticipated outcomes). If you only have 2 goals, skip to tasks.</p> <p>Goal #3</p> | |
| | Objective 1 | Notes: |
| | Objective 2 | |
| | Objective 3 | |
| | Objective 4 | |
| | Objective 5 | |

Copy this form for additional activities




| | | |
|---|---|---------------|
|  <p>5. Set objectives for additional goals</p> <p>Continue to establish additional long-term goals and short-term objectives</p> | 5.2 Goals and objectives, continued — Establish long-term goals and for each goal, short-term objectives (or anticipated outcomes). If you only have three goals, skip to tasks. Goal #4 | |
| | Objective 1 (short-term results or anticipated outcomes) | Notes: |
| | Objective 2 | |
| | Objective 3 | |
| | Objective 4 | |
| | Objective 5 | |



| | | |
|---|--|--------|
|  <p>5. Set objectives for additional goals</p> <p>Continue to establish additional long-term goals and short-term objectives</p> | 5.2 Goals and objectives, continued — Establish long-term goals and for each goal, short-term objectives (or anticipated outcomes). If you only have four goals, skip to tasks. Goal #5 | |
| | Objective 1 | Notes: |
| | Objective 2 | |
| | Objective 3 | |
| | Objective 4 | |
| | Objective 5 | |



| | | |
|---|---|----------------------|
|  <p>5. Set objectives for additional goals</p> <p>Continue to establish additional long-term goals and short-term objectives</p> | <p>5.2 Goals and objectives, continued — Establish long-term goals and for each goal, short-term objectives (or anticipated outcomes). If you only have five goals, skip to tasks.</p> <p>Goal #6</p> | |
| | <p>Objective 1 (short-term results or anticipated outcomes)</p> | <p>Notes:</p> |
| | <p>Objective 2</p> | |
| | <p>Objective 3</p> | |
| | <p>Objective 4</p> | |
| | <p>Objective 5</p> | |



| | | |
|---|--------------------------|-----------------------------------|
| Tasks and activities— What activities will be done to achieve this result? | 5.1 Goal #1 | |
| | 5.1.1 Goal 1 Objective 1 | 5.1.1 Tasks and activities |
| | Notes | |
| | 5.1.2 Goal 1 Objective 2 | 5.1.2 Tasks and activities |
| | Notes | |
| | 5.1.3 Goal 1 Objective 3 | 5.1.3 Tasks and activities |
| | Notes | |
| | 5.1.4 Goal 1 Objective 4 | 5.1.4 Tasks and activities |
| | Notes | |
| | 5.1.5 Goal 1 Objective 5 | 5.1.5 Tasks and activities |
| Notes | | |



| | | |
|---|--------------------------|-----------------------------------|
| Tasks and activities— What activities will be done to achieve this result? | 5.2 Goal #2 | |
| | 5.2.1 Goal 2 Objective 1 | 5.2.1 Tasks and activities |
| | Notes | |
| | 5.2.2 Goal 2 Objective 2 | 5.2.2 Tasks and activities |
| | Notes | |
| | 5.2.3 Goal 2 Objective 3 | 5.2.3 Tasks and activities |
| | Notes | |
| | 5.2.4 Goal 2 Objective 4 | 5.2.4 Tasks and activities |
| | Notes | |
| | 5.2.5 Goal 2 Objective 5 | 5.2.5 Tasks and activities |
| Notes | | |



| | | |
|---|--------------------------|-----------------------------------|
| Tasks and activities— What activities will be done to achieve this result? | 5.3 Goal #3 | |
| | 5.3.1 Goal 3 Objective 1 | 5.3.1 Tasks and activities |
| | Notes | |
| | 5.3.2 Goal 3 Objective 2 | 5.3.2 Tasks and activities |
| | Notes | |
| | 5.3.3 Goal 3 Objective 3 | 5.3.3 Tasks and activities |
| | Notes | |
| | 5.3.4 Goal 3 Objective 4 | 5.3.4 Tasks and activities |
| | Notes | |
| | 5.3.5 Goal 3 Objective 5 | 5.3.5 Tasks and activities |
| Notes | | |



| | | |
|---|--------------------------|-----------------------------------|
| Tasks and activities— What activities will be done to achieve this result? | 5.4 Goal #4 | |
| | 5.4.1 Goal 4 Objective 1 | 5.4.1 Tasks and activities |
| | Notes | |
| | 5.4.2 Goal 4 Objective 2 | 5.4.2 Tasks and activities |
| | Notes | |
| | 5.4.3 Goal 4 Objective 3 | 5.4.3 Tasks and activities |
| | Notes | |
| | 5.4.4 Goal 4 Objective 4 | 5.4.4 Tasks and activities |
| | Notes | |
| | 5.4.5 Goal 4 Objective 5 | 5.4.5 Tasks and activities |
| Notes | | |



| | | |
|---|--------------------------|-----------------------------------|
| Tasks and activities— What activities will be done to achieve this result? | 5.5 Goal #5 | |
| | 5.5.1 Goal 5 Objective 1 | 5.5.1 Tasks and activities |
| | Notes | |
| | 5.5.2 Goal 5 Objective 2 | 5.5.2 Tasks and activities |
| | Notes | |
| | 5.5.3 Goal 5 Objective 3 | 5.5.3 Tasks and activities |
| | Notes | |
| | 5.5.4 Goal 5 Objective 4 | 5.5.4 Tasks and activities |
| | Notes | |
| | 5.5.5 Goal 5 Objective 5 | 5.5.5 Tasks and activities |
| Notes | | |



| | | |
|---|--------------------------|-----------------------------------|
| Tasks and activities— What activities will be done to achieve this result? | 5.6 Goal #6 | |
| | 5.6.1 Goal 6 Objective 1 | 5.6.1 Tasks and activities |
| | Notes | |
| | 5.6.2 Goal 6 Objective 2 | 5.6.2 Tasks and activities |
| | Notes | |
| | 5.5.3 Goal 6 Objective 3 | 5.6.3 Tasks and activities |
| | Notes | |
| | 5.6.4 Goal 6 Objective 4 | 5.6.4 Tasks and activities |
| | Notes | |
| | 5.6.5 Goal 6 Objective 5 | 5.6.5 Tasks and activities |
| Notes | | |



6. Establish Project Timeline [Sample Worksheet](#)



Summarize key tasks, dates, and person primarily responsible. Insert appropriate month names or week dates in top row. Note specific tasks, persons responsible, and dates by which each should be completed. Lengthy tasks can be noted by drawing an arrow in the timeline from when each task starts to when it concludes. One-time events can be noted with a date in the appropriate cell of the table.


| Tasks/ Responsibilities | Month or week | Month | Month | Month | Month | Month | Month | Month | Month | Month | Month | Month |
|-------------------------------|---------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| Planning tasks | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Program management tasks | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Funding and financial tasks | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Partnership maintenance tasks | | | | | | | | | | | | |
| | | | | | | | | | | | | |
| Evaluation tasks | | | | | | | | | | | | |



Time out for partnership check in

Most partnerships focus on the tasks at hand. It is good to pause and talk about the partnership itself.

Answers to these questions may forestall some predictable problems that might otherwise thwart your collaborative work.

Partnership Process Checklist: **Take time now from planning to be sure you are clear about partner roles, responsibilities and processes.** 

- How do you intend to keep in touch to further plan and implement the project?

- Should you set the date of your next meeting? Yes No
- Do you intend to meet regularly or consult each other by phone or email? Yes No
- Have you collected phone numbers and mailing and email addresses? Yes No
- Who acts as fiscal agent for the project?
- Is it clear how decisions are made to spend money on behalf of the project? Yes No
- What happens if there is a financial surplus or deficit at the conclusion of the project?

- Who represents the project to the news media or to school officials?

- Considering intended beneficiaries and outcomes, are there key people or groups not yet been involved in the project? How will they be consulted, involved or the program marketed to them



7 Budget

If this project was grant funded, review the proposed budget and determine whether any changes are required. Note also what in-kind personnel and material resources are needed, what can be supplied by each of the partners, and what additional resources are needed. Are any of the partners' salaries and overhead expenses to be paid out of project funds?

Budget writing can be sobering for a partnership if the costs exceed feasible revenues. You may need to plan more fundraising or amend objectives.

Sample Budget Sheet

7. Budget— Develop a budget for your collaborative initiative.

Estimate revenues and expenses associated with this program.

| | |
|--|--|
| REVENUES | |
| Cash contributions from partners | |
| Program admissions | |
| Fees or tuition | |
| Advertising | |
| Sales | |
| Grants | |
| Business/corporate | |
| Local/county | |
| State/Federal | |
| Foundation | |
| Business or individual sponsorships | |
| Other contributions | |
| Gross revenues from fundraising events | |
| TOTAL REVENUES | |
| EXPENSES | |
| Staff salaries/benefits (portion devoted to program) | |
| Outside fees and services | |
| Artist fees | |
| Arts program expenses | |
| Facility | |
| Printing/copying | |
| Advertising | |
| Postage (devoted to program) | |
| Travel | |
| Supplies | |
| Fundraising event expenses | |
| Overhead (portion devoted to the program) | |
| Other expenses | |
| TOTAL EXPENSES | |
| NET INCOME (EXPENSE) | |



8 Plan fundraising.

This step may come early or late in the planning process.

Some partnerships are achieved without seeking funds from outside the partnership. In other cases the partners seek grants and contributions.

A well-established partnership can secure outside funds.

Note the potential for conflict if an appeal to a donor on behalf of the partnership limits an individual agency from direct funding.

8.1 Fundraising — If additional funds are required, how much money is needed by when?

8.2 What are likely sources?

8.3 Who should take the lead to approach each of the above sources?

8.4 If grants are planned, how will required matches be secured? Can the project or key portions proceed if grants are not successful?



9 Anticipate evaluation

Evaluation is the subject of the Learning Partnership Evaluation Workbook

This page suggests the first step, which is to frame the evaluation. If you are ready to plan the evaluation you should skip this worksheet and move to the Learning Partnership Evaluation Workbook.

9. Evaluation

The first step is to frame the evaluation to determine how the project will be evaluated.

9.1 Will you evaluate the project? Yes No

9.2 At which level will you evaluate?

Learning outcomes of participating students (usually called "assessment," what did students or other participants learn?)

The collaborative project (were project outcomes achieved?)

The partnership itself (how can the partnership be improved or sustained?)

9.3 Who will conduct the evaluation? Team members (who?) Outside evaluator (how selected)?

9.4 Will you evaluate while the project is in progress (formative evaluation) or at the conclusion (summative evaluation)? Formative Summative



Learning Partnerships

Planning Workbook

Arts Extension Service, University of Massachusetts Amherst

This concludes the Learning Partnerships Planning Workbook.

To generate a draft plan for your partnership based on your answers to the questions in the workbook, confirm the name of your partnership in the box below and click the "submit" button.

The draft plan is an HTML document that you can save to your computer. You can view or print out the saved copy any time you wish using a web browser or word processing program.

Although you can save a copy of the workbook (PDF) file on your hard drive, **information that you enter into the workbook is not saved with it.** To save your work, print copies of the filled-out workbook pages.

If you have a licensed copy of Adobe Acrobat (the application used for authoring PDF files), then you can save the information entered into the workbook as an .FDF file. Consult the Acrobat documentation to find out how to do this. The free Acrobat reader plug-in does not include this capability, unfortunately.